



Your trusted business partners

## Have You Seen Our New Logo?

We have a new, modern look, with a new logo and a new name, JDW Chartered Accountants Limited. What hasn't changed is the same care that we have for you, our Jolly Duncan & Wells clients. It has been sixty years since Frank Jolly started the original firm, and forty-five years since he joined with Gerald Duncan and Murray Wells to create Jolly Duncan & Wells. We honour their legacy of service by continuing to uphold their values.

We help business owners to succeed by giving them the financial, tax and business information and support they need to make better decisions. In our firm, we care about our clients. We are interested in what interests them. We are accessible to them by our location and our use of technology.

## Our Values

**Integrity** – We stand by our moral and ethical principles. We are honest and reliable.

**Empathy** – We identify with the feelings of others. We care for our clients and our community.

**Simplicity** – We use words that are easy to understand. We look for straight-forward solutions to complex problems.

**Partnership** – We work alongside our clients. We offer our experience and advice when they need it. We look for opportunities to help them in their business.

## Get Your Discount Before It Disappears

We made a special introductory offer in our previous email, and it's about to run out. We have limited spaces left and you will need to book in before 31 October 2018 to take advantage of these rates:

Business Planning:

\$1,200 +GST (Normally \$1,500 +GST)

Cashflow Forecasting with monthly updates for 12 months:

\$1,500 +GST (Normally \$3,600 +GST)

Contact Rupesh, Serena, Brian or Murray to find out more.

## AML/CFT

The next phase of the Anti-Money Laundering and Countering Financing of Terrorism (AML/CFT) Act 2009 took effect from 1 October 2018. This requires us as Chartered Accountants to perform customer due diligence on new clients and many of our existing clients.

Customer due diligence involves certifying personal identification and address verification documents. For trusts and some other structures, we are also required to record the source(s) of wealth of the trust or structure. We are required to perform this certification process, even though we may have known you personally for many years, so please excuse us for asking. We will be contacting many of you over the coming months to complete the certification process.

## Recommendations and Reviews

We were delighted to receive this recommendation recently from Tony Coleman.

“As a customer of JDW for over 30 years I highly recommend this accountancy firm. Approachable, diligent, reliable. BTW Nice Logo.”

We would like to work with more people like you, so please tell your friends and associates about us.

If you would like to write a recommendation, please feel free to email us or post it directly to our new Facebook page:

<https://www.facebook.com/pg/JDWCharteredAccountants/reviews>

While you are in Facebook, please Like our page so you will receive regular tips to help you in your business.